

Appl no: 10/668,816
Limberg, et al.

This listing of claims will replace all prior versions and listing of claims in the application.

What is claimed is:

Claims 1 - 17 (Withdrawn)

18. (Original) A method for generating a financial obligation statement for a non-gratuitous benefit provided to a client comprising:

- establishing an event with a client;
- determining a level of compliance with one or more requirements established by a third party payor in privity with said client;
- displaying said level of compliance;
- generating a financial obligation statement derived at least in part from said level of compliance; and,
- transmitting said financial obligation statement to said third party payor.

19. (Original) The method according to claim 18 wherein said estimating an event includes:

- recording at least demographic information associated with a group of prospective clients attending a presentation associated with said provider;
- establishing at least one of said group of said prospective clients as said client;
- scheduling an appointment with said client;
- recording information associated with said third party payor;
- providing a benefit to said client; and,
- recording said benefit provided to said client.

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20. (Original) The method according to claim 18 wherein said estimating an event includes:
- receiving a referral for a prospective client;
 - establishing said prospective client as said client;
 - scheduling an appointment with said client;
 - recording information associated with said third party payor;
 - providing a benefit to said client; and,
 - recording said benefit provided to said client.
21. (Original) The method according to claim 18 wherein said estimating an event includes:
- scheduling an appointment with said client, wherein said client is an established client;
 - providing a benefit to said client; and,
 - recording said benefit provided to said client.
22. (Original) The method according to claim 18 wherein said transmitting includes recording an approval provided by an authorized individual associated with said provider.
23. (Original) The method according to claim 18 further including;
- receiving a reply from said third party payor, wherein said reply comprises payment information granted by said third party payor; and,
 - automatically reconciling differences between said financial obligation statement and said payment information.
24. (Original) The method according to claim 18 wherein said client is a healthcare patient, said provider is a healthcare provider, and said third party payor is a public insurance provider, a private insurance provider or combination of distinct public and private insurance providers.

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25. (Original) The method according to claim 18 wherein said transmitting includes:
accumulating a plurality of financial obligation statements destined for said third party payor; and,
transmitting said plurality of financial obligation statements to said third party payor in a batch.
26. (Original) The method according to claim 25 wherein said accumulation is accomplished absent a clearinghouse intermediary.
27. (Previously Amended) A system for generating a financial obligation statement for a non-gratuitous benefit provided to a client for provision to a third party payor comprising:
a computer system comprising;
a processor;
a user interface coupled to said processor;
a display interface coupled to said processor;
a telecommunications apparatus coupled to said processor;
a memory coupled to said processor, said memory having operatively stored therein a data structure comprising information associated with a client; and,
at least one application comprising instructions executable by said processor for carrying out the functions of:
determining a level of compliance from said information,
displaying said level of compliance on said display interface,
generate a financial obligation statement from said information, and
transmitting said financial obligation statement to said third party payor via said telecommunications apparatus.

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28. (Original) The system according to claim 27 wherein said data structure comprises a database having stored therein a plurality of client data including information associated with said client.
29. (Original) The system according to claim 28 wherein said database comprises;
a client data storage area having at least one client record associated with said client stored therein;
an events data storage area having at least one event record associated with said client stored therein;
a third party payor data storage area having at least one third party payor record associated with said client stored therein; and,
a benefits data storage area having at least one benefit record associated with said client stored therein.
30. (Original) The system according to claim 28 wherein said database is disposed on a server in data exchange communication with said computer system.
31. (Currently Amended) The system according to claim 27 wherein said level of compliance is displayed on said display interface in a ~~visual manner~~ relative scale that is indicative of the level of compliance.
32. (Original) The system according to claim 31 wherein said relative scale is based at least in part on a level of complexity associated with obtaining said information.
33. (Original) The system according to claim 27 wherein said display interface includes an end user customizable graphical user interface.

Claims 34 - 50 (Withdrawn)

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51. (Original) A computer program product embodied in a tangible form readable by at least one processor having executable instructions stored thereon for causing said at least one processor to at least determine a level of compliance from inputted information, display said level of compliance on a display interface, generate a financial obligation statement from said inputted information, and transmit said financial obligation statement to a third party payor via a coupled telecommunications apparatus.

Claims 52 - 53 (Withdrawn)

54. (New) The system according to claim 51 wherein said database is disposed on a server in data exchange communication with said computer system.

55. (New) The computer program product according to claim 51 wherein said level of compliance is displayed on said display interface in a relative scale that is indicative of the level of compliance.

56. (New) The computer program product according to claim 55 wherein said relative scale is based at least in part on a level of complexity associated with obtaining said information.

57. (New) The computer program product according to claim 51 wherein said display interface includes an end user customizable graphical user interface.